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TO: Distribution
FROM: Market Information / Bruce Neidle
SUBJECT: INTEGRATED WEEKLY NIELSEN REPORT-WEEK ENDING 6/22/96

DATE: October 7, 1996

ALL OUTLETS COMBINED

PM and Marlboro each posted retail share gains of +0.2 points this week (to 49.6% and 33.4%, respectively), with a slight decline in c-stores more than fully offset by advances in the scanning outlets. Positive performance in supermarkets, drug stores and mass merchandisers likely benefited from the first week of the "Marlboro Unlimited and Basic Summer Special" program. Due to the timing of the c-store audits (which are concentrated in early to mid-week), share response from the MUBSS program in this trade class will not likely be evident until next week. The Discount category declined -0.1 point versus week-ago to 26.3%, with RJR PL experiencing the largest loss. Among the major competitive premium franchises, Camel posted the only week-to-week share gain (of at least +0.05 points), coinciding with increased money-off and free product deals.

- PM's share advanced +0.2 points this week to 49.6%, with Marlboro and Basic accounting for the majority of the gain, partially offset by OPB declines.
 - PM achieved record high share levels in drug stores and mass merchandisers this week of 51.2% and 59.8%, respectively.
- Marlboro's share increased +0.2 points to 33.4% (versus 33.3% last week due to rounding), likely influenced by money-off deals associated with the "Marlboro Unlimited and Basic Summer Special" program.
- OPB's share trailed week-ago by -0.1 point to 9.1%, corresponding with the scheduled completion of the PBSS program.
- Basic's share of industry increased +0.1 point this week to 4.5%, while its share of category was up +0.4 points to 17.3%. Basic's performance likely benefited from initial implementation of MUBSS money-off deals.
- The Discount category declined -0.1 point this week to 26.3%. Among the major discount entries, Basic and Doral posted the largest weekly gains (+0.1 point each), while RJR PL incurred the largest week-to-week loss (-0.1 point).

JUNE RETAIL SHARE PROJECTION						
<u>Period</u>	<u>PM-USA</u>			<u>MARLBORO</u>		
	<u>Proj.</u>	<u>Actual</u>	<u>Actual Vs. Proj</u>	<u>Proj.</u>	<u>Actual</u>	<u>Actual Vs. Proj</u>
May		49.4			33.3	
6/1/96	49.5	49.6	0.1	33.4	33.4	0.0
6/8/96	49.6	49.2	-0.4	33.3	33.1	-0.2
6/15/96	49.7	49.4	-0.3	33.3	33.3	0.0
6/22/96	50.0	49.6	-0.4	33.7	33.4	-0.3
6/29/96	50.2			34.0		
MTD	49.7	49.4	-0.3	33.4	33.3	-0.1
<u>EXPLANATION</u>						
6/22/96	Share likely influenced by initial implementation of money-off deals associated with the MUBSS program. Share effects in c-stores are lagging implementation of the promotion due to the timing of the audit.					
6/15/96	Share likely influenced by the first full week of sales associated with the PBSS program and a rebound from last week's "first week of the month" decline.					
6/8/96	Share likely influenced by ongoing depletion of Marlboro promotional support and the "first week of the month" effect.					
6/1/96	Share possibly influenced by continued redemption of "Marlboro May Offensive" direct mail coupons and expanded/continued availability of free product offers for Virginia Slims and Basic.					

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INTEGRATED WEEKLY NIELSEN REPORT
October 7, 1996

CONVENIENCE STORES

PM's share was off slightly this week (-0.1 point) to 50.2%. Marlboro's share declined -0.2 points versus week-ago to 35.3%. To some extent, performance was likely impacted by increased competitive promotional activities. Marlboro and Basic money-off incidence associated with the first partial week of implementation of the "Marlboro Unlimited and Basic Summer Special" increased (+14 points and +11 points, respectively). However, share response from this promotion is not likely to be evident until next week. The Discount Category was relatively stable this week at 26.7%.

Competitive promotional activities continued to intensify this week. RJR expanded money-off incidence on Camel and Winston (+4 points each) to 42% of c-stores each (Winston's highest level to-date) and maintained Doral's record high level of 44% of c-stores. Camel free product deals (primarily B3G3F) were up +3 points this week to 11% of c-stores. B&W recently dropped a Multibrand "Super Savings" direct mail package that contained carton and pack coupons for their major premium and branded discount products (consisting of a total of 28 coupons and a potential savings of \$55.80).

- PM's retail share declined -0.1 point this week to 50.2%, driven primarily by Marlboro.
- Marlboro's share trailed week-ago by -0.2 points to 35.3%.
 - Marlboro money-off incidence was up +14 points versus week-ago to 32% of c-stores, corresponding with initial implementation of the MUBSS program.
- PM OPB's share was essentially unchanged this week at 8.1%, with a slight B&H gain offset by losses among the other franchises. Corresponding with the scheduled completion of the PBSS program, money-off incidence on Virginia Slims, Merit and B&H declined -6 to -7 points.
- Basic's share was relatively stable this week at 4.6%, while its share of the Discount category increased +0.2 points to 17.2%.
 - Basic's money-off incidence increased +11 points to 22% c-stores this week, corresponding with initial implementation of the MUBSS program.
- The Discount category remained relatively stable versus week-ago at 26.7%. Among the major discount entries, Doral and GPC realized the largest weekly gains, up +0.1 point each. RJR PL incurred the largest loss, down -0.2 points versus week-ago to 3.8% (its lowest level since w/e 12/30/95).
- Among the competitive premium products, Newport and Camel were the only brands to post share gains versus week-ago of at least +0.05 points. Camel's share reached 6.0%, its highest weekly level since w/e 2/17/96.

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